

Takes More Than Just Technology

The advantages of going paperless are well-documented. You've heard all the arguments and all the promises for how it can help you save money, be more profitable, be more productive, and essentially have a happier, more satisfying life...all true. You also know that there are a lot of costs involved and a great deal of upfront capital investment. And then, how can you be sure you're doing it right?



As president of XCM Solutions, **Glen Keenan**, CPA, leverages his extensive experience in public accounting and software to help firms solve the paperless work management challenge.

What do you need to go paperless? Well, there are technology considerations and there are people considerations, and both have a big impact on whether or not you're doing it right and whether you can effectively reap all the rewards "going paperless" promises.

Technology Considerations

The answer to the technology question will vary according to the needs of your

firm: How many people are in your firm? How many offices do you have? What kind of services do you deliver? What infrastructure do you have in place? How much money do you have to spend? And so on.

What may be obvious is that you will need some type of scanner—after all, how will you make all that paper go away? And, a place to store the files you create by making the paper go away. Your budget may dictate whether you use a sophisticated Windows Explorer document tree, an electronic file cabinet, or a more robust document management system that automates a

WORKFLOW AUTOMATION DOESN'T SOLVE THE CHANGE MANAGEMENT PROBLEM

great deal of the storage, retrieval, and compliance considerations.

Depending on the services you offer (and how big your budget is), you may also need paperless engagement, tax, billing, bookkeeping, payroll solutions, etc. Oh, and a portal to allow your clients to share their information.

People Considerations

That brings us to the people issue, which is really one of process and change management. Let's tackle the easier one first—adapting your processes (all of them—not just tax, not just A&A, but marketing, HR, training—you get the point) to your new paperless world. After all, if you're still using the same paper-based processes, but with electronic files—are you really gaining any efficiencies? And, why are you still passing around the control slip or routing sheet if the files are gone?

Auditing your existing processes and adapting them for your new technologies, then documenting them, are important first steps and may take some time. Getting all of your firms' employees, from the top down, to follow the new processes is the bigger challenge—that goes back to the change management issue.

Shouldn't technology help with that too?

Workflow automation doesn't solve the change management problem. It does solve the work management problem, an integral facet of process change and standardization—an important first step to going paperless. And, giving people more control over their work—at all levels and in all roles firm-wide—will help you more effectively manage the change.

Going paperless is not just about implementing technology and eliminating paper, it's a fundamental change in how you work as a firm and as a professional. To that end, workflow automation should not mean simply automating specific processes, it should empower people and teams to work more effectively in all departments across the firm. It standardizes processes, centralizes knowledge, and helps your staff manage their responsibilities, while creating the accountability the firm and its people need to be successful.

For many firms, implementing the XCM™ workflow automation software to address these challenges first has paved the way for a smoother transition to paperless document management and engagement systems, and helped to maximize the efficiencies gained.

A firm's greatest assets are the talents and collective knowledge of its people—that's how we, as professionals, bill our clients, how we structure our services, how we measure our success. And, the hallmark of a successful paperless initiative is how well it enhances your existing assets. **SR**